THE PROBLEM OF HIPPARCOS DISTANCES TO OPEN CLUSTERS. II. CONSTRAINTS FROM NEARBY FIELD STARS1

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ABSTRACT

This paper examines the discrepancy between distances to nearby open clusters as determined by parallaxes from Hipparcos compared to traditional main-sequence Dtting. The biggest di†erence is seen for the Pleiades, and our hypothesis is that if the Hipparcos distance to the Pleiades is correct, then similar subluminous zero-age main-sequence (ZAMS) stars should exist elsewhere, including in the immediate solar neighborhood. We examine a color-magnitude diagram of very young and nearby solar-type stars and show that none of them lie below the traditional ZAMS, despite the fact that the Hipparcos Pleiades parallax would place its members 0.3 mag below that ZAMS. We also present analyses and observations of solar-type stars that do lie below the ZAMS, and we show that they are subluminous because of low metallicity and that they have the kinematics of old stars.

Subject headings: open clusters and associations: individual (Pleiades) È solar neighborhood È stars: distances È stars: evolution È stars: Hertzsprung-Russell diagram

1. DISTANCES TO OPEN CLUSTERS

The results of the Hipparcos mission have recently appeared (European Space Agency 1997), and they provide unprecedented astrometric precision and accuracy for a very large sample of stars. Analyses of these results are just beginning, of course, but to us some of the most intriguing Hipparcos measurements are those of nearby open clusters, such as the Hyades, Pleiades, Praesepe, and a Persei.

Open clusters are critical laboratories for testing stellar evolution models, since they provide large samples of stars of a single age and composition (as near as we can tell, anyway) over a broad range of mass. Those models are calibrated against the Sun, the one star for which we know fundamental properties with very high accuracy. Thus, we construct stellar models, adjust them to match the Sun, and then test them against open clusters, because those clusters have near-solar composition, making it possible to work di†erentially. Having passed those tests, we have some con-Ddence that the models can then be applied to signiDcantly di†erent conditions, such as globular clusters, that are vital for establishing the cosmic distance scale.

This paper and the companion paper by Pinsonneault et al. (1998; hereafter Paper I) are motivated by concern over the accuracy of the Hipparcos results. Nearly all the Hipparcos cluster distances disagree with conventionally determined values, although in most cases the di†erences do not

conNict with the estimated uncertainties. But the Pleiades is an especially egregious case. The Hipparcos estimates of the Pleiades parallax range from 8.54 to 8.65 mas, depending on the solution used: Robichon gets 8.54 \(^{\text{0.22}}\) (see Table XXVI of van Leeuwen 1997); Mermilliod et al. (1997) get 8.60 ^ 0.24; van Leeuwen & Hansen Ruiz (1997) quote 8.61 ^ 0.23 as their solution A (this value also appears in van Leeuwen & Evans 1997 and van Leeuwen 1997) and 8.65 \(^\) 0.24 as their solution B. These correspond to a distance of about 116 pc, or a distance modulus of 5.33 mag. Traditional determinations of the cluster's distance (e.g., VandenBerg & Bridges 1984; Soderblom et al. 1993, hereafter SSHJ) are based on a comparison of the cluster's main sequence to that of nearby stars, which leads to a distance modulus of about 5.6. The same value of 5.6 has been derived by Dtting a spectroscopic binary to isochrones (Giannuzzi 1995). Boesgaard & Friel (1990) show that the essentially solar metallicity. Thus, the Hipparcos results suggest that Pleiades members are about 0.3 mag fainter than we have thought up to now. Can these diterent estimates be reconciled? Can a zero-age main-sequence (ZAMS) star with solar metallicity be 30% fainter than our current models predict? These are the essential questions that we address here.

The Hipparcos parallax of van Leeuwen & Hansen Ruiz (1997) is based on measurements of 54 Pleiades members, ranging in m_V from about 3 to 11, so it represents a good cross section of the cluster. Hipparcos observations are reduced to an absolute reference frame, but the measure-

¹ Based on data from the European Space Agency Hipparcos astrometry satellite.

ments are correlated within a limited region of the sky as the satellite swept out great circles. These correlated measures have been corrected for (van Leeuwen & Hansen Ruiz 1997) as part of the e†ort to reduce all the Hipparcos observations in a consistent and systematic way. Reconciling the Hipparcos distance with the traditional estimate would imply systematic errors larger than the quoted uncertainties. There is, therefore, no obvious reason to believe that the Hipparcos distance to the Pleiades contains a systematic error that is large enough to bring it into accord with the traditional distance.

The traditional distance measure appears, on the face of it, to be just as sound. It is based on the comparison of a Pleiades color-magnitude diagram (CMD), corrected for a small amount of reddening, to a CMD created from nearby stars with large parallaxes, or to a CMD of the Hyades suitably corrected for the di†erence in metallicity. Theoretical isochrones can also be converted to observational coordinates using a color calibration, and the o†set between the isochrone and the cluster can be used to infer the distance modulus. This technique is used in Paper I and yields similar results. In this paper, we reexamine the comparison of the Pleiades to nearby stars. Our hypothesis is that the stars of the Pleiades cannot be completely unique in our Galaxy and that there must be nearby examples of stars that share the same unknown stellar physics or unusual parameters that result in the Pleiades stars being so faint. It should therefore be possible to Dnd examples of anomalously faint ZAMS stars that are so close to the Sun that errors in parallax cannot account for their faintness. If no such stars exist, as we will show, then either we have failed to account for some fundamental aspects of stellar physics adequately, or there are unappreciated errors in the Hipparcos parallaxes.

2. AN OBSERVATIONAL ZAMS USING NEARBY SOLAR-TYPE STARS

We start by showing that nearby solar-type stars that are known to be young do not lie below the usual ZAMS. The idea of comparing a cluster main sequence to one constructed from nearby stars with large parallaxes is not new, but the nearby stars are of many ages and evolutionary states, which spreads the apparent main sequence considerably. The appropriate comparison, of course, is to very young nearby stars, since the clusters in questions are essentially ZAMS themselves.

In this case, by young we mean very active, as determined from observations of the Ca II H and K lines. Table 1 lists our sample. The northern stars have been observed as part of the Mount Wilson survey of chromospheric emission in late-type dwarfs (Vaughan & Preston 1980; Soderblom 1985; Soderblom & Mayor 1993), from which we have taken the $R_{\overline{HK}}^{o}$ index of HK emission. To the extent that they have been measured, these stars have metallicities near solar (Cayrel de Strobel et al. 1992). The photometry of the northern stars is from Mermilliod & Mermilliod (1994). We divided these northern stars into two subsets. The Drst consists of the most active of the stars, those with $\log R_{HK}^{\text{\tiny \tiny MK}}$ [[4.40, to which we added a few others that are slightly less active but so well studied that there is no ambiguity about their youth (HD 39587 \setminus s1 Ori is an example). The second subset of northern stars is also active, but not as much so or not as well studied; these have $\log R_{HK}^{\varrho}$ values from [4.41 to [4.44. We have also included some southern stars from the HK survey of Henry et al. (1996) that have log R_{IK}^{ω} values from [4.20 to [4.40; that paper provides the photometry.

The parallaxes given in Table 1 are from Hipparcos (European Space Agency 1997). We kept only those stars with p /n \lesssim 0.1, so that parallax error could not accidentally place a star signiDcantly below the ZAMS. We also excluded stars with known companions unless we were con-Ddent that the companion is not inNuencing the HK observations or the photometry.

Our young stars are shown in Figure 1. The large <code>Đlled</code> circles represent the <code>Prst</code> subset; i.e., the stars most likely to be bona <code>Pde</code> ZAMS objects. The small <code>Plled</code> circles represent the other northern stars, and the open circles are the southern stars. The solid line shows a theoretical ZAMS from D. A. VandenBerg (1997, private communication). This has been calibrated to reproduce the solar temperature and luminosity (represented by the diamond) at the Sunß age, and to <code>Pt</code> the M67 cluster main sequence at its age. The dashed line shows the ZAMS transformed to the CMD using the color-temperature relation of Bessell (1979). For reference, the long-dashed line shows the same ZAMS (for 100 Myr age and <code>[Fe/H] \ 0.0</code>) used in Paper I. About half the di†erence between the VandenBerg and Paper I isochrones arises in the color-temperature relations used.

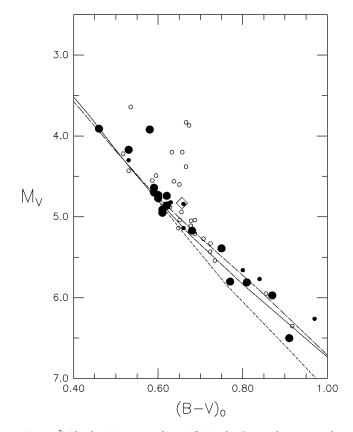


Fig. 1.È Absolute V magnitude vs. B[V color for nearby young solar-type stars. Parallaxes are from the Hipparcos output catalog, while colors and magnitudes are from Mermilliod & Mermilliod (1994). The large <code>Bled</code> circles represent stars with high levels of chromospheric activity, taken to represent the ZAMS. The smaller <code>Blled</code> circles are also active stars, but less so. The open circles show active stars from the HK survey of Henry et al. (1996). The solid line shows a theoretical ZAMS from VandenBerg, calibrated as described in the text. The dashed line shows the same ZAMS, but using the color-temperature relation of Bessell (1979). The diamond shows the position of the Sun. For reference, the long-dashed line shows the ZAMS used in Paper I.

 $\begin{tabular}{ll} TABLE & 1 \\ Absolute & Magnitudes & And & Colors & Gar-Type & Stars \\ \end{tabular}$

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105712 203244 0.723 6.97 140.88 ^ 3.09 5.43 [4.39 113579 217343 0.655 7.48 31.22 ^ 0.93 4.94 [4.27							-			
113579 217343 0.655 7.48 31.22 ^ 0.93 4.94 [4.27										
117500 999597 0000 000 1004 004 400 5400		217343		7.48						
11/390 ZZ333/ U.000 8.03 18.64 \ 0.64 4.38 [4.36	117596	223537	0.666	8.03	18.64 ^ 0.64	4.38	[4.36			

Their zero-points are close (the VandenBerg isochrone is, on average, 0.04 mag fainter in the range of 0.5 to 0.9 in B[V), and there is a slight di \dagger erence in the slopes of the main sequences. Di \dagger erences in the color-temperature relations are a larger source of uncertainty for the cooler stars, as the increasing di \dagger erence between the VandenBerg and Bessell lines indicates.

The theoretical isochrones are clearly an excellent representation of the observations. We anticipate Đnding stars

above the ZAMS by modest amounts because they are photometric binaries, but we note that none of the young stars fall below the ZAMS. Thus, there is no hint in this small sample that there are any nearby young stars that are 0.3 mag below the usual ZAMS.

Figure 2 shows a similar CMD for the Pleiades, taken from SSHJ and corrected for reddening of $0.04\,$ mag in B[V and $0.12\,$ mag in V. The lines in this θ gure are the same as in Figure 1, but displaced by $5.6\,$ mag. This com-

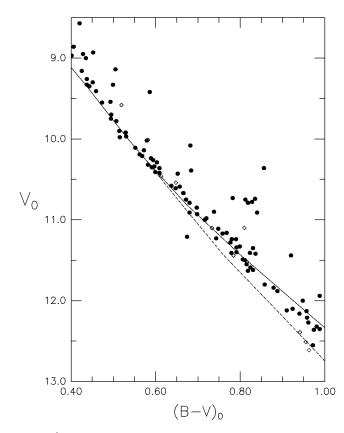


Fig. 2.È CMD for Pleiades solar-type stars. The derivation of the photometry is described in Soderblom et al. (1993) and is already corrected for reddening of 0.04 mag in B[V and 0.12 mag in V . The lines are the same as in Fig. 1, but displaced by a distance modulus of 5.6 mag. The diamonds represent Pleiads that are ultrafast rotators, meaning stars with v sin i ≥ 30 km s ~ 1 .

parison shows that di†erent isochrones can di†er from one another and from the cluster by 0.1 mag or more for B[V \gtrsim 0.7. The Bessell relation is clearly too blue, while both the VandenBerg and Paper I isochrones are too red for B[V \gtrsim 0.8. Note, however, that these theoretical ZAMS lines deviate from the Pleiades in the same way that they deviate from the Đeld stars of Figure 1, underscoring the comparability of the two samples.

To emphasize that the traditional distance to the Pleiades does not depend on assumptions of age, in Figure 3 we show a CMD for nearby stars and the Pleiades, for (m [M) \setminus 5.6. The color used in Figure 3 is V [I in the Cousins system, in order to have an index that is less sensitive to metallicity than B[V, and Deld stars of all ages are represented. The nearby star parallaxes and colors are from the Hipparcos Catalog, and we used only stars with measured V [I, excluding those where V [I had been estimated from B[V or other colors. The Pleiades data are from J. R. Stau†er (1997, private communication), who transformed his observations of Pleiads in the Kron V [I color (Stau†er 1984) to Cousins V [I using the relation of Bessell & Weis (1987), correcting for reddening in the process. The Pleiades V magnitudes have been shifted by 5.6 for distance and by 0.12 to correct for extinction. Both main sequences overlap for V [$I \lesssim 1.7$. The Pleiads redder than this depart from the Deld-star sequence simply because they are so young that they lie above the main sequence. There are essentially no nearby stars below the ZAMS deDned by the Pleiades.

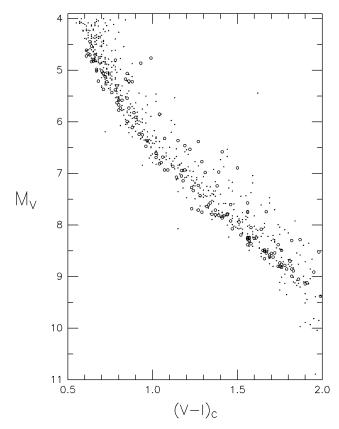


Fig. 3.È CMD for the Pleiades and for nearby stars, using Cousins V [I colors. The colors and parallaxes for the nearby stars (small θ lled circles) are from the Hipparcos catalog, and we have used only those stars for which actual measured V [I colors exist. The Pleiades photometry (open circles) is from Stau†er, and his Kron V [I colors are transformed to Cousins colors using the Bessell & Weis (1987) relation. The Pleiades colors have been corrected by 0.06 mag for reddening. The Pleiades magnitudes assume a distance modulus of 5.6 and $A_{V} \setminus 0.12$ mag.

3. SUBLUMINOUS STARS

We have just shown that nearby young stars lie on or above the usually accepted ZAMS and that none lie below it. We now show that those stars that do lie below the ZAMS are old stars of low metallicity, not young stars analogous to Pleiads.

We began by extracting from the Hipparcos catalog all stars within 60 pc. We kept only those stars with p /n \ 0.050 and p(B[V) \ 0.025. The portion of these stars that lie below the ZAMS is shown in Figure 4. We observed six of these stars, which are shown by squares in Figure 4. We used the Hamilton spectrograph on the Lick 3 m Shane reÑector, reducing the data in the usual way within IRAF (see SSHJ for details). The stars and the spectroscopic results are listed in Table 2. [Fe/H] was determined from the strength of the Fe I 6750 Å line in comparison to a solar spectrum of similarly high resolution. This is a small number of stars, due to poor observing conditions, but they were chosen randomly from the stars that lie about 0.3 mag below the ZAMS.

As we anticipated, most of these stars have unresolved rotation and subsolar metallicities, which accounts for their locations in the CMD. (Carney et al. 1994 show $[Fe/H] \setminus [0.61$ for HIP 23431, in accord with our value.) There is one star, HIP 25127, that has obvious θ bling-in of the Ha line (Fig. 5). This star also has relatively strong Li,

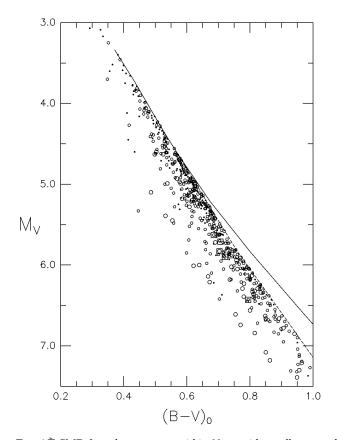


Fig. 4.È CMD for solar-type stars within 60 pc, with parallaxes good to 10% or better, and with p(B[V) \ 0.05 mag. Only those stars lying below the ZAMS are shown. The symbols denote di†erent ranges of the transverse velocity (v a). Dots have v 30 km s~1, small circles have v from 30 to 100 km s~1, and large circles denote v [100 km s~1. The stars in squares were observed at high resolution and are listed in Table 2. The lines are the same as in Fig. 2.

the indicated equivalent width implying log N(Li) \bowtie 2.35. We also estimate v sin i for HIP 25127 to be approximately 7 km s~1, based on a comparison of line breadths in this star to others in the sample. All these factors suggest youth, but this star's position in the CMD is due to its low metal-

licity of [0.3, and so HIP 25127 validates models of ZAMS stars by conprming that low-metallicity stars appear to lie well below the solar-metallicity ZAMS, even if they may be young.

The symbols in Figure 4 indicate the transverse velocities of the subluminous stars, calculated from the Hipparcos proper motions and parallaxes. Small <code>Blled</code> circles indicate v $_{\rm trans}$ $\,^30$ km s~1 (the median velocity for all stars within 50 pc). Small open circles indicate 30 \leq v $_{\rm trans}$ $\,^100$ km s~1 (the 95th percentile), while the large open circles have transverse velocities that exceed 100 km s~1. The scarcity of low-velocity stars and the higher velocities of the more subluminous stars strongly suggest that the objects in Figure 4 represent an old population, lying below the ZAMS because of low metallicity. The lack of subluminous stars with B[V \lesssim 0.5 also indicates an old population.

A more detailed examination of the kinematics of these stars requires radial velocities to provide the third dimension, and a more strictly limited sample to minimize the e†ects of observational errors. For this purpose, we extracted stars within 50 pc from the Hipparcos Catalog, accepting only those stars with p/n \ 0.05 and p(B[V) \ 0.025. Binaries and stars with other astrometric problems were rejected using Ñag H59 (European Space Agency 1997, Vol. 1, p. 126). This left a clean sample with 3345 stars. Of these, we found radial velocities in the Hipparcos Input Catalog for 1799, and these were used to calculate Galactic space motions U, V, and W. Correction to the local standard of rest (LSR) was done using the new solar motion (U, V, W)LSR \ (] 10,] 5,] 7) km s~1 from Hipparcos data (Dehnen & Binney 1997).

Figure 6 shows the (U, V) ISB and (V, W) diagrams for these 1799 stars. The sample has been divided into 1598 stars lying on or above the ZAMS (left panels) and 201 stars falling 0.1 or more mag below the ZAMS (right panels). Table 3 summarizes the kinematic properties of these stars. The net range of velocities is roughly the same for both samples, but the ZAMS-and-above sample is highly concentrated near the LSR, and its core shows vertex deviation and clumpiness, which are characteristics of a young, low-velocity population. By contrast, these characteristics are completely absent in the di†use velocity distribution of the

TABLE 2 Spectroscopic Observations of Six Subluminous Stars

HIP No.	HD No.	(B[V)	v	n (mas)	M _V	W (Li)	[Fe/H]	v trans
7	7320 10166 32237 243086	0.740 ^ 0.020 0.703 ^ 0.041 0.685 ^ 0.003 0.794 ^ 0.001 0.720 ^ 0.015 0.706 ^ 0.029	9.64 9.66 8.95 9.37 8.19 9.15	17.74 \(^1.30\) 17.16 \(^1.47\) 21.71 \(^1.25\) 25.82 \(^1.56\) 34.88 \(^1.46\) 20.54 \(^1.22\)	5.88 5.83 5.63 6.43 5.90 5.71	≤3 ≤3 7 ≤3 ≤3 94	[0.31 [0.68 [0.50 [0.43 [0.64 [0.27	77 103 47 49 56 11

TABLE 3
KINEMATICS OF NEARBY STARS

Sample	N stars	SU _{LSR} T	SV _{LSR} T	SW_{LSR}^{T}	p(U)	p(V)	p(W)
All stars	1799	[2.3	[18.4	[1.1	40	31	19
	201	0.0	[26.4	[1.1	63	55	27
0.1 to 0.2 below ZAMS	63	[8.2	[18.0] 4.1	43	33	20
0.2 to 0.5 below ZAMS	108	[2.8	[18.4	[2.4	56	37	27
[0.5 below ZAMS	30] 27.4	72.5	7.6	104	104	38

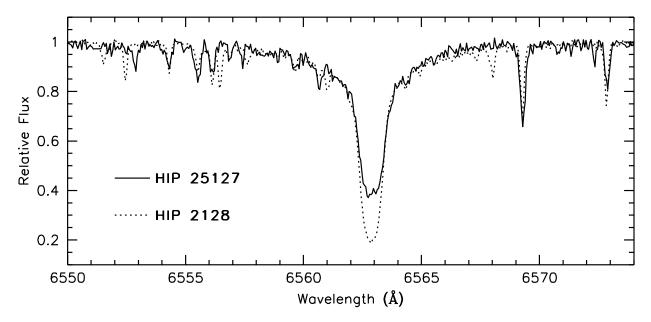


Fig. 5.È Ha proble of HIP 25217 compared to HIP 2128. HIP 2128 shows the usual deep Ha absorption proble of an old, inactive star, while HIP 25217 exhibits signi θ -cant θ -lling-in of Ha due to chromospheric activity. However, HIP 25217 has [Fe/H] B [0.3]

subluminous stars. The conclusions to be drawn from Figure 6 and Table 3 are clear: the 201 stars that appear to lie below the ZAMS are dispersed in velocity space and chieÑy represent the Galaxÿİs thick disk population, with a small admixture of halo stars. These stars are subluminous simply because this old population has metallicities substantially below solar.

It is still possible, of course, that some small fraction of these subluminous stars are, in fact, young. Such stars should have low space motions; to attempt to identify any young, subluminous stars, we selected 30 stars with B[V \ 1.2 that lie within 1 p of the LSR in all three coordinates. Ten of these stars, listed in Table 4, fall 0.2 mag or more below the ZAMS. We used SIMBAD to search for additional information that might indicate the ages of these 10 stars or reveal the reasons for their apparent sub-

luminosity. As indicated in Table 4, most of these stars have low [Fe/H] or some other spectroscopic indication of old age (such as weak H and K emission or a low Li abundance). Two stars appear to have signi θ cant errors in their colors, including the only star of the 10 with any evidence of youth.

4. CONCLUSIONS

We have been unable to Đnd any nearby stars with solar metallicity that are very young and below the traditional ZAMS, despite the Hipparcos results that suggest that the Pleiades stars are 0.3 mag fainter than that ZAMS. We have also shown that nearby stars that do lie below the ZAMS show evidence of old age, as expected.

This leaves two possibilities. The Drst is that the Hipparcos parallaxes for the Pleiades and other clusters are

TABLE 4
Ten Low-Velocity Subluminous Stars

HIP No.	HD No.	(B[V)	M_{V}	Spectral Type	Note
8275	10853	1.044	7.10 ^ 0.07	K5	1
12184	16232	0.51	4.12 ^ 0.09	F4 V	2
44984	78661	0.355	3.60 ^ 0.07	F2p	3
56998	101581	1.064	7.28 ^ 0.02	K5 V	4
58863	104828	1.072	7.35 ^ 0.11	K0	5
68796	123710	0.590	5.00 ^ 0.06	G5	6
80366	147776	0.950	6.73 ^ 0.06	K2 V	7
81520	149612	0.616	5.33 ^ 0.04	G3 V	8
106231	22 4409	1.050	7.24 ^ 0.06	K8	9
114790	219249	0.695	5.54 ^ 0.07	G6 V	8

Notes.È (1) Gliese 74, dK8; Gliese & Jahreiss 1991. Marginally subluminous. (2) Hipparcos B[V error; SIMBAD lists B[V \ 0.51, from Tolbert 1964. (3) [Fe/H] \ [0.3; Cowley & Crawford 1971. (4) Gliese 435; Favata, Micela, & Sciortino 1997 note low Li. (5) Eggen 1985 lists this star as a member of his Hyades Supercluster, with (m[M) \ 2.82, implying M $_{V}$ \ 7.03, which is 3 p brighter than the Hipparcos M $_{V}$. (6) [Fe/H] \ [0.58; Cayrel de Strobel et al. 1997. (7) Gliese 621. Eggen 1986 lists this star as a member of the 4 Gyr Wolf 630 Group. (8) Inactive star; Henry et al. 1996. (9) LO Peg; P \ 0.4 day, A \ 0.09 mag; European Space Agency 1997; Hipparcos color is discrepant with spectral type of K8 (B[V \ 1.2). Sterzik & Schmitt 1997 note high X-ray Ñux and a strong Li feature, suggesting youth.

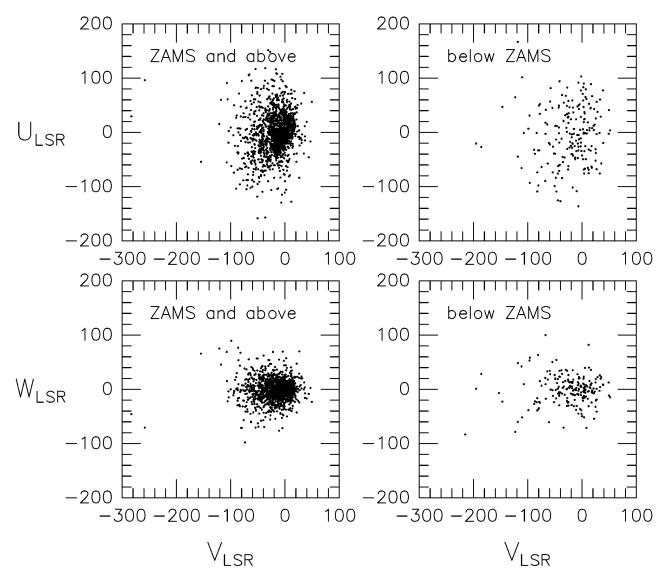


Fig. 6.È Galactic space motions for nearby stars (d \setminus 50 pc). The starting sample was taken from the Hipparcos catalog and includes 3345 stars with p /n \setminus 0.05 and p(B[V) \setminus 0.025, with binaries and other problematic objects rejected. Radial velocities were available for 1799 stars from the Hipparcos Input Catalog, and those were used with the parallax and proper motions to calculate U, V, and W in a right-handed coordinate system. The motions have been corrected for solar motion relative to the local standard of rest. The left panels show the 1598 stars that lie on or above the ZAMS, while the right panels show the 201 stars that lie [0.1 mag below the ZAMS.

correct but that Pleiades-like stars are rare in the immediate solar neighborhood, or we have just been unlucky in Dnding them. Surveys of activity in nearby stars have been comprehensive enough to not have missed any signiDcant number of genuinely young stars, and we cannot accept the ad hoc explanation that the Pleiades is simply bizarre. We should note here that Gatewood (1995) measured a parallax for the Coma cluster and found those stars to be subluminous to an extent similar to what is found for the Pleiades. However, Gatewood is result depends on only three stars in Coma, one of which had a particularly large uncertainty. Moreover, the proper motions of the two remaining stars ditered signiDcantly. Thus Gatewoodls measurements are intriguing, but not sufficient to substantiate Hipparcos. (Gatewoodk Coma results also di†er from the traditional measures in a sense opposite to that seen by Hipparcos, meaning that they conNict with each other.)

If stars in the Pleiades are indeed 0.3 mag fainter than we have thought up to now, then there are significant aspects of

stellar physics that have so far gone unappreciated. Paper I shows how difficult this notion is to accept, but if it is true, then we surely cannot trust our inferences of distances to the globular clusters if we cannot reproduce the behavior of stars that are nearly identical to the Sun.

The second possibility is that the Hipparcos parallaxes have small systematic errors. The correction needed to bring the Hipparcos Pleiades distance into agreement with the traditional value is almost exactly 1 mas. As shown in Paper I, the Hipparcos parallaxes of the brightest Pleiads in the core of the cluster are the most discrepant and weigh most heavily in the net cluster parallax, because of their low formal errors. For this reason, we suspect that the Hipparcos net parallax for the Pleiades is wrong.

The detection and measurement of visual binary orbits for Pleiades stars could provide an independent estimate of the cluster's distance. Such binaries would be difficult to observe, but are within the capabilities of the Fine Guidance Sensors on the Hubble Space Telescope, for example.

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